

Hargreaves Lansdown is a trading name of Hargreaves Lansdown Asset Management Limited (a wholly-owned subsidiary of Hargreaves Lansdown plc), authorised and regulated by the Financial Conduct Authority. The company is registered in England and Wales with company number 01896481, with its registered office at the address shown.

**HARGREAVES
LANDSOWN**

SIPP Transfers

One College Square South
Anchor Road
Bristol
BS1 5HL

Telephone: 0117 980 9926
www.hl.co.uk

Retirement Capital
Pension Practitioner Venture Wales
Merthyr Tydfil Industrial Park
Pentrebach
Merthyr Tydfil
Mid Glamorgan
CF48 4DR

25 February 2022
Our Ref: 1997649

URGENT

Pension Transfer: Request for Discharge Forms

Dear Sir/Madam

Existing Policy: Retirement Capital NB869307C
Member: Mrs M Baker, 4 Steadings Rise Knutsford Cheshire WA16 0WB
Transferring into: HL SIPP (PSTR – 00616238RC)

Please find attached a letter of authority to enable our client to transfer the above policy to the HL SIPP. I would be grateful if you could send the necessary transfer out details to enable this to proceed.

What we require from you (please email where possible):

<input type="checkbox"/>	Discharge Forms
<input type="checkbox"/>	Details of current scheme, including values
<input type="checkbox"/>	Details of any safeguarded benefits including the below*

*Please note the HL SIPP **cannot automatically** accept transfers from the following schemes:

- AVCs linked to a Defined Benefit scheme, where the AVC can provide some or all of the main scheme Tax Free Cash entitlement
- Money Purchase schemes or Section 32 plans with an underpin or containing GMP or 9(2B) rights
- Cash Balance schemes

If you do not provide this information we will have to contact you again to confirm it.

Additionally, please advise us if either the pension has been crystallised in full or part or if there is a court order attached to the plan.

If you have any further queries on this matter, or any other, please do not hesitate to contact me on 0117 980 9891 or at sipptransfers@hl.co.uk

Yours faithfully,

SIPP Transfer Management Team
Hargreaves Lansdown

Transfer to the HL SIPP. Leave blank if you're not transferring a pension

- This type of transfer usually takes 6-8 weeks, depending on your investments and provider. If you select this option we will convert any funds transferred to the lowest cost version we offer. We will never convert you into a fund that's more expensive than the one you already hold. There are no charges or tax to pay. Before transferring please read about converting funds at www.hl.co.uk/convert.

Your details

Pension details

- Policy number:

☐ Tick if this is a drawdown policy

I confirm

- I authorise the current provider as listed above to give Hargreaves Lansdown any information they require about my membership of the above scheme.

**Please
sign here**

Date: 220222

7. Would you like to choose your investments now? – ignore this step if you don't like to choose your investments now

Investment choice Full fund/share name	Transfer (min. £100 per fund)	Lump sum (min. £100 per fund)	Monthly saving (min. £25 per investment)
Vantage			
	%	£	£
24 FEB 2022	%	£	£
	%	£	£
	%	£	£
	%	£	£
	%	£	£
	%	£	£

If you'd like to choose more investments please let us know on a separate sheet.

☐ Reinvest income automatically

☒ Hold income as cash in your SIPP

Cash

Total 100%

False Statements – It is a serious offence to make false statements; the penalties are severe and could lead to prosecution.

* NOTE: PLEASE SEND REQUEST TO: GEORGINA STULIGHOWA *